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RUNNING INSIGHT

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Dressing for Success

When people ask me the biggest change I've observed with runners over the past decade, I usually say "they dress better."

If you can't remember how runners were dressing 10 or 20 years ago, go back and look at race photos from 1995. Lots of singlets, cotton race shirts, tight shorts, high tube socks and the occasional headband. Compare that with today's race photos, which are full of color-coordinated runners, who are hooking up their shoes with apparel and nifty accessories like arm sleeves, watches and hats.

One of the reasons I notice stuff like that is because I had a brief stint early in my career in "fashion" publishing. I spent a few great years as a business reporter for *Women's Wear Daily*. I wrote about supply and demand, not skirt lengths and necklines. And it was a wonderful experience. I learned a great deal, interviewed hundreds of really smart, creative people and worked under one of the most influential editors in publishing over the past 50 years, John Fairchild. I did not spend a lot of time with "Mr. Fairchild" as everyone called him so I soaked up his wisdom every chance I got. When someone asked him the biggest change he had seen in his lifetime of covering fashion, he instantly replied "the shift to casual dressing." This was 25 years ago when guys were still wearing suits to the office most days, but Mr. Fairchild had already seen the beginning of what has become a major permanent change in our culture.

I don't think he foresaw the day when women would be wearing yoga pants to the office, but this is a guy who saw the advent of the mini skirt, then the pendulum swing to the mid and the maxi length skirts, so I suspect nothing would surprise him.

People dress to feel good and express themselves and athletically styled clothing fulfills both of those desires. Any runner will tell you when they slip on a new shirt or pair of tights, they feel faster. I know I do. I had a day recently where I was out of bed at 6:00 a.m. and immediately dressed for a workout. Before I could get to my home gym, all hell broke loose: Issues with getting the kids to school, an early fire to put out in the office and then two emergency conference calls. I never got to work out that day, but I also never changed my clothes.

That's the way Americans dress today, not just runners or athletes, every day normal folks. Back when I was logging serious running miles, I'd occasionally miss a day. On one "miss" day, a rainy Sunday in Syracuse, I watched football and drank Miller Lites with my running pal, JP. Drinking light beer, we agreed after our third bottle, was almost as good for us as running.

That's how it is with activewear. You might not ever make it to the gym, but how you dress gives you some aspiration. If a road race or yoga class breaks out in the middle of the day, you're ready. This is a trend that running stores can cash in on. This new kind of dressing may not lead to success at the office, but it can certainly spell success for running stores.

Mark Sullivan

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The Long Tail

Can running stores take advantage of the “long tail” theory to sell more women’s apparel? In the 2006 business bestseller, “The Long Tail”, author Chris Anderson put forth the theory that the Long Tail in our culture and economy is increasingly shifting away from a focus on a relatively small number of “hits” (mainstream products and markets) at the head of the demand curve and toward a huge number of niches in the tail. If that theory holds, specialized women’s activewear brands could have “a long tail,” which could translate into a major business opportunity for running stores. Here are a number of women’s activewear brands that will be exhibiting at The Running & Fitness Event For Women in Chicago June 9-10 that may be able to help retailers capitalize on that trend.

**Tonic**

For more than a decade, Tonic has been designed and manufactured in Vancouver, Canada using environmentally responsible practices and high quality fabrics. The company has a number of high profile ambassadors including tennis star Martina Hingis, Olympic rower Will Dean and yoga instructors Katrina Surdi, Kristen Hawkinson and Emily Millen.

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Kari Traa

Kari Traa is a former freestyle skier with three Olympic medals to her name and is the creator of a sportswear brand. Her Norwegian heritage has not only given Kari a talent for sport but also an eye for design and creativity. While she was training and competing, Kari began knitting beanies for friends and customizing her own ski-gear. Her designs became so popular amongst friends and fellow skiers from around the world that the Kari Traa brand was born, with a focus on sportswear designed to fit the feminine form but still able to cope with the demands of an active, sporty and adventurous lifestyle.

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RUNNING INSIGHT

Lukka Lux

Lukka Lux is an activewear brand with roots in NYC offering high-end fashion sportswear apparel.





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In the Spotlight

Catching Up with Athletes on the Leading Edge / By Jennifer Ernst Beaudry



Worth the Wait for Mirinda Carfrae

She holds the women’s course record for the grueling Ironman World Championships in Kona, and since 2009 has won three golds, two silvers and a bronze in the sport, but growing up in Australia, Mirinda Carfrae just wanted to play ball. “I was a high-level basketball player in [school], but being only 5’3”, I wasn’t going to go anywhere too special,” she said. Having met some triathletes while training, Carfrae said she was intrigued, and she did her first Olympic-distance triathlon in 1999. By 2005, she decided to make the switch to Ironmans — “I was more suited to long-course,” she said — but didn’t enter her first race until four years later. It was worth the wait: in 2009, Carfrae

placed second in the first Ironman she qualified for, and won the world title the next year, with first-place finishes in 2013 and 2014 as well. (She had an additional 2nd place finish in 2011 and a bronze in 2012.) She’s the current Championship course record holder, a time of 8:52:14 that she set in 2013. In late June, Carfrae plans to race Ironman Austria. “Racing in Europe is a lot of fun, because it’s part of their culture. People are happy to just sit around all day and spectate,” she said. “It’s really great for the athletes.” And she’ll focus on Kona in October. It may have taken almost 10 years to get here, but Carfrae said she’s never looked back: “For me, the door was open and when you’re on the right path, things became easy.”



No Stopping Magdalena Lewy-Boulet

A career studded with top marathon finishes—she won the 2002 San Francisco Marathon, among other highlights—would be enough accomplishment for a lot of people, but Magdalena Lewy-Boulet isn’t stopping there. After switching her focus to ultra distances in 2013, she won the grueling Western States 100-Mile Endurance Run last year, in her inaugural attempt. This summer, she’ll try to win it again. And she plans to run a second 100-miler, the Ultra Trail du Mont Blanc in Chamonix, France, just two months later. “I’ve been a runner for half my life—it feels like I evolved into this,” she said. Lewy-Boulet is also deeply involved in the run industry from another side: she’s a VP of product development for longtime sponsor GU Energy Labs. Still training with

distance-running legend Jack Daniels, who’s been her coach for 15 years, Lewy-Boulet said the shift to ultras has been a positive one. “My approach to training changed, but I think for the better,” she said. “[Marathons] took very structured training—with ultra running, I’ve been able to be a lot more creative.” Ultras have opened up new areas, too. “I often ask myself how come I didn’t do this sooner. It’s taken me to the most amazing places, training and races-wise,” she said. “It’s definitely been an amazing discovery for me. I get so much out of being part of this amazing outdoors world—I get confidence and I’ve become a better leader, mom and co-worker,” she said. “I’m very lucky that the sport has opened the door for me to discover that.”

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THE RUN SPECIALTY BUSINESS

A Decade Of Change

BY DANIEL P. SMITH

In 2005, stability shoes ruled, men represented 50 percent of the running specialty channel's shoe sales and the average shoe price sat under \$87. A decade later, plenty has changed across the run specialty footwear landscape. With data in hand from Florida-based Sports Marketing Surveys and informal conversations with retailers across the country as well as brand representatives, *Running Insight* looks at six unique changes in the running footwear marketplace over the last decade and explores what each means today and moving forward.

1. Escalating Shoe Prices

THE NUMBER OF RUNNING SHOES sold over the \$100 price point has more than quadrupled since 2005. A decade ago, 16.4 percent of shoes sold topped \$100; last year, that number exceeded 72 percent.

While that figure alone in a vacuum excites many running retailers taking home more top-line revenue, the baseline has shot up as well requiring more initial investment to land goods. Some running retailers, meanwhile, are wondering how the continued escalation of shoe prices might impact consumer perception of a stagnant channel some already see as exclusive or unapproachable.

Over the last decade, the average shoe price has exceeded inflation. In 2005, the average shoe price stood at \$86.46, or about \$105 in 2015 currency. In reality, the average shoe price in 2015 was nearly \$110.

In part, it's a product of the global economy, one that endured swelling labor costs and watched the surging price of oil push materials and transportation costs upward. With oil, in particular, settling

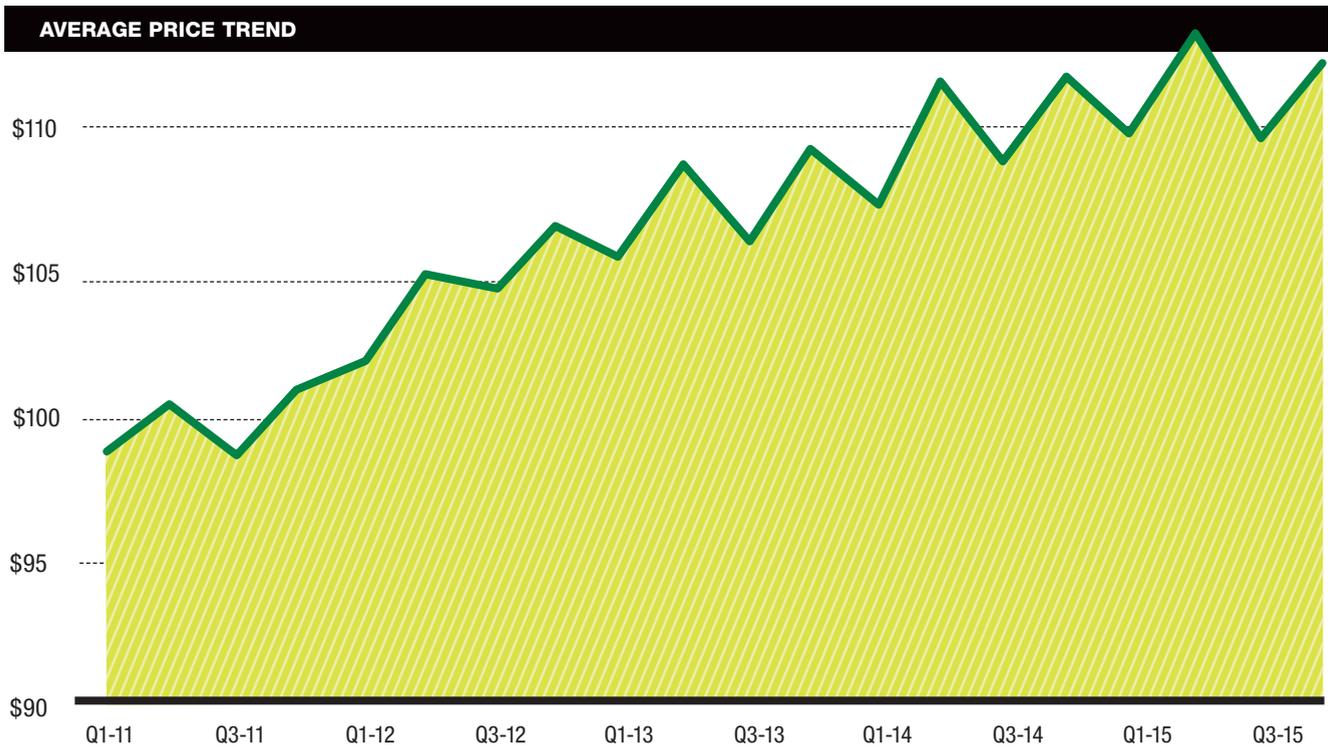


of late and the running specialty channel soft after years of explosive growth, even through a damaging economic recession, might brands and stores need to be even more mindful of pricing in the years ahead?

The smart money says yes. And at least one of the major brands is working on a

version of one of their top selling, high priced shoes that retailers can sell for \$110.

On the higher end, both the men's and women's ASICS Nimbus are among the top selling shoes as is the \$150 Brooks Beast. And then there is the maximal trend, which has been fueled by shoes in the \$140 to \$160 range. ■



Source: Sports Marketing Surveys

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2. Hold On: People Are Paying The Prices, So Who Cares?

OF THE TOP 10 SELLING FOOTWEAR MODELS IN 2015, all are priced at \$120 or above, so for all of the talk about a potential price bubble, consumers continue climbing the price



mountain with manufacturers and retailers.

The potential problem, two different running shoe reps noted, resides with the overabundance of product in the marketplace and consumers' increasing recognition that they can score favorable deals on the web, at discount shops or at big-box stores. After grabbing a few models through one of these alternative channels for a discounted rate, consumers then bring that reality into their next running store visit. The problem is fewer and fewer running store shoe walls have much to offer in the \$100 range.

At least in the short term, decreasing oil prices offer manufacturers an opening to try hitting the \$100 price point with different models, but will they?

If brands are not done raising their prices and engaging in a chess game of sorts with their footwear competitors, then what might be done on the channel's entry-level side to offer quality footwear at more economical price points? And, frankly, does it even matter? ■

3. Stable Players In Stability

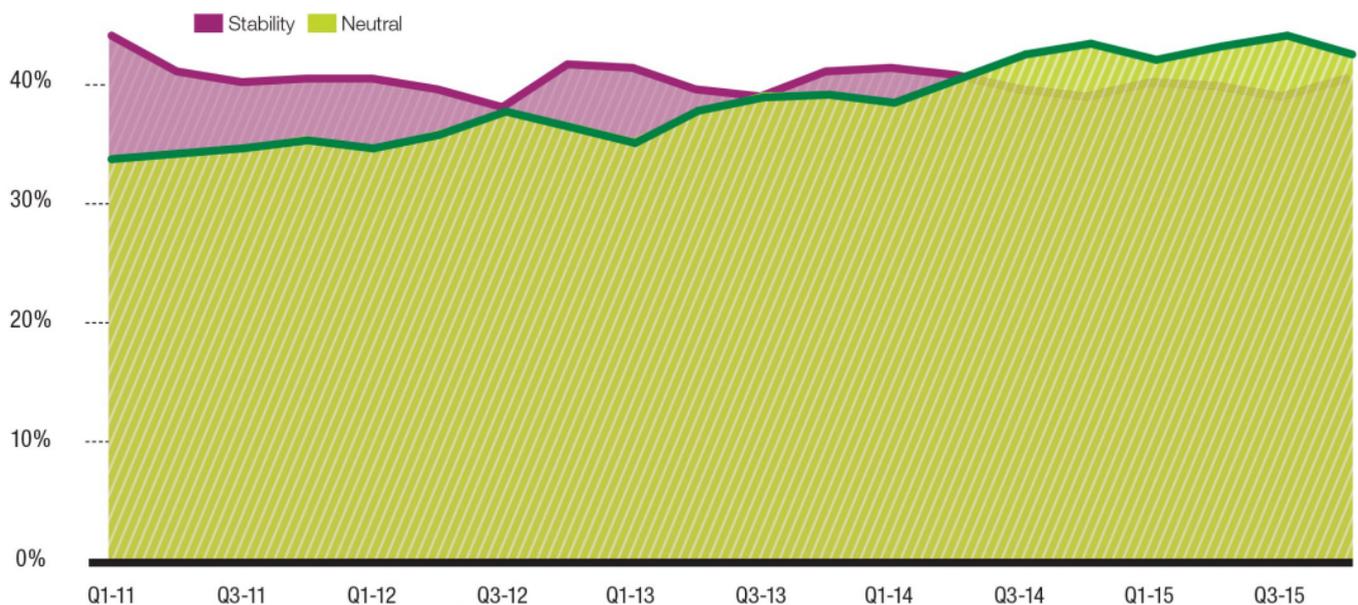
SO HERE'S AN INTERESTING COUNTERPOINT TO NEUTRAL's ascent and stability's dip: in 2015, six of the top 10 selling footwear models fell into the stability category and a few notable models – the Brooks Adrenaline, ASICS 2000, Saucony Guide and Mizuno Inspire – carried the stability torch.

“The rich getting richer,” said one footwear brand rep, who notes that a growing number of retailers are opting to carry

various colorways of these trusted stability models rather than bringing in a more diverse assortment of stability footwear.

In the neutral category, by contrast, a greater number of models are generating attention. Retailers are generally not only more likely to experiment with different neutral models, but also to try upstart, niche brands, most of whom have entered the running specialty channel with neutral footwear. ■

DOLLAR SHARE TREND BY TYPE



Source: Sports Marketing Surveys



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4. What's Left Of Motion Control?

SALES OF MOTION CONTROL SHOES CONTINUE TO fall. In 2015, motion control sales captured a little over 5 percent of the channel's footwear revenue, down roughly two-thirds from 2005. Interestingly, however, the Brooks Beast remains the channel's third best-selling men's shoe.

One footwear rep with stints at numerous brands says many companies have struggled to figure out the business model of manufacturing motion control shoes. "For many," he contends, "the math of making motion control shoes just doesn't make sense." Furthermore, he adds, motion control

shoes – life-changing as they have proven to be for some runners – aren't sexy or brand building, which has further compelled manufacturers to vacate the space.

As with the dip in stability shoe sales, one footwear company representative wondered if insoles weren't playing a role.

"Rather than the bulky motion control shoe, why not a stability shoe with an insole to boost the ticket?" he says.

So where will the motion control category, a segment that represented about one out of every six footwear sales in 2005 but only one out of 20 last year, be in another 10 years? ■

5. Neutral Supplants Stability

IN 2005, NEUTRAL SHOES REPRESENTED 27 PERCENT of the channel's footwear sales, a whopping 15.5 percentage points behind stability shoes. Today, it's neutral footwear's world as the cushioning category captures nearly 41 percent of all shoe sales, nearly two points ahead of stability. In the last decade, consumers' feet haven't changed, so what gives?

We've seen the emergence of the "less is more" ideology, of course, as well as the "more is more" ideology, two waves that have been led overwhelmingly by neutral footwear.

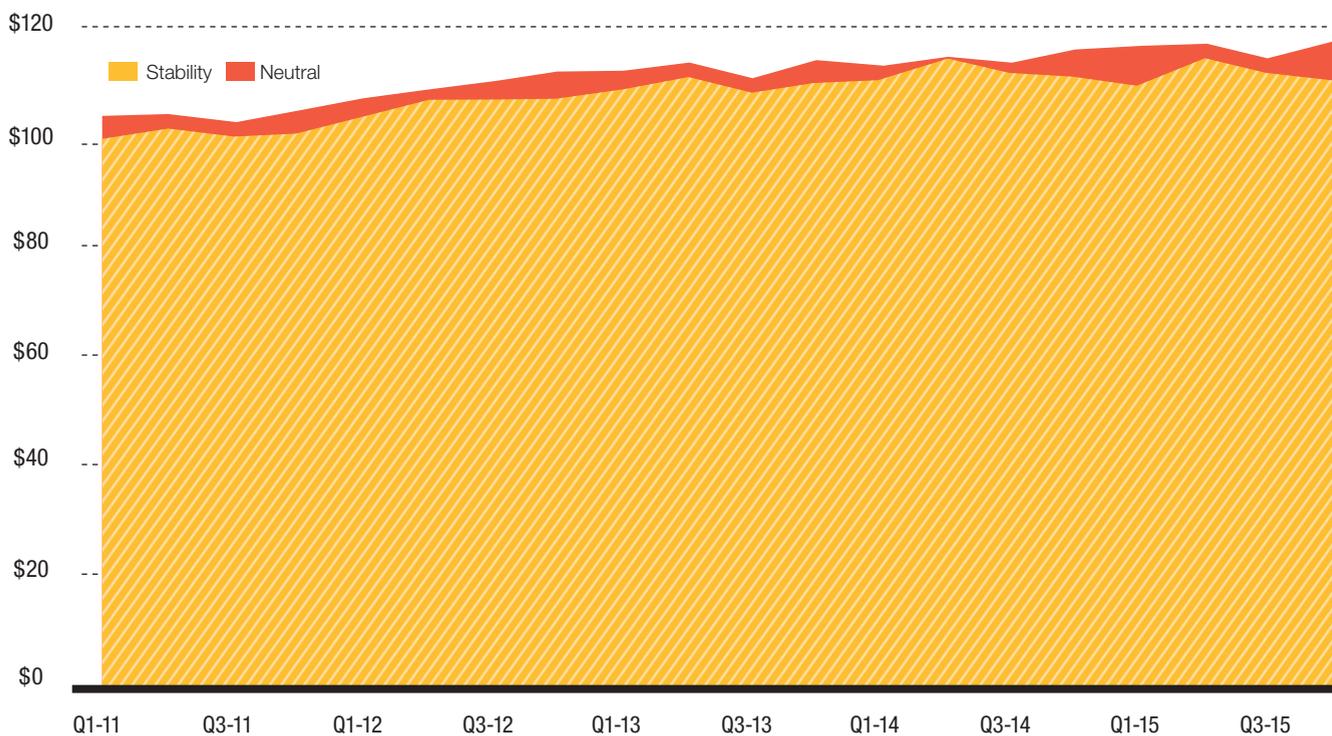
For so long, many running shoe staffers were told to look for

overpronation and to prescribe a stability shoe. Pronation control was the running shop's value add. One footwear brand rep even termed medial posting "the industry's security blanket."

In recent years, however, mild pronation hasn't led to a parade of stability shoe trials in front of the shoe wall. In fact, stores seem increasingly willing to corral add-on sales by addressing modest pronation with a neutral shoe and a supportive insole.

Some observers would say this shift has been over-stated, driven by a re-classification of products from 2005 through

AVERAGE PRICE BY TYPE



Source: Sports Marketing Surveys



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2015. In 2005, SMS had four classification categories (Stability at 42.6 percent share; Cushioning at 27.1 percent; Motion Control at 16 percent and “other” at 14.3 percent). In 2015, lightweight was added to the list, which resulted in the following breakout:

- Stability: 39.6%
- Cushioning: 40.9%

- Motion Control: 5.4%
- Lightweight: 6.2%
- Other: 7.9%

With the 2015 addition of the lightweight category, which is overwhelmingly driven by neutral shoes, one could make the argument that the gap between neutral and stability is greater than what topline data shows. ■

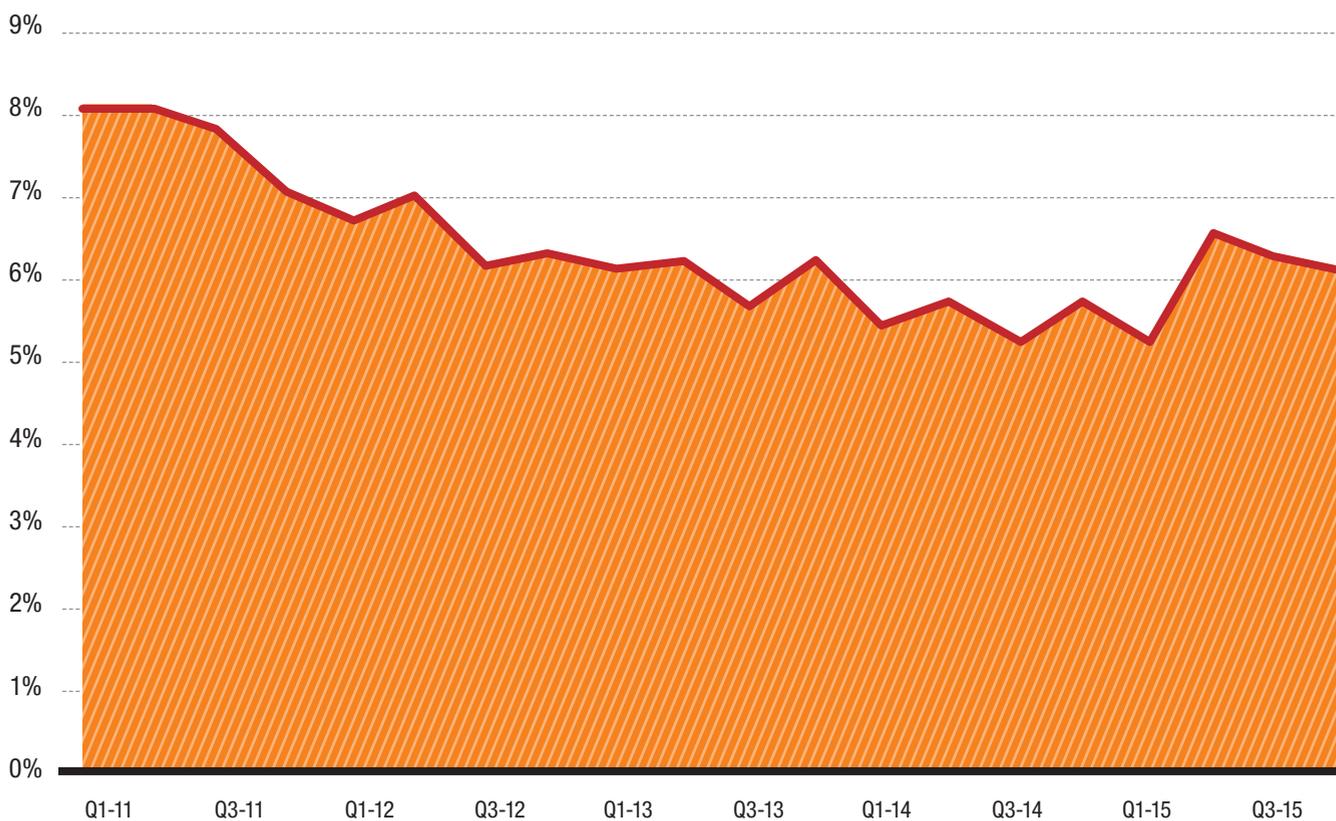
6. What About the Men?



FOR ALL THE FOCUS – ALBEIT JUSTIFIED AND worthy – on the female consumer, men still remain steady buyers of footwear in the run specialty channel. In 2015, men represented 46.2 percent of all running footwear purchases. While that’s a 4 percent dip from 2005, the fact remains men continue to be strong buyers of footwear in the channel.

While the female demographic has undoubtedly earned its seat at the head of the table and celebrated women’s-focused brands like Athleta, Lululemon and Lucy have added further appeal to women’s fitness category, run shops cannot neglect, overlook or take for granted their male customers in a hustle to be more female-friendly spaces. ■

MOTION CONTROL TYPE DOLLAR SHARE



Source: Sports Marketing Surveys

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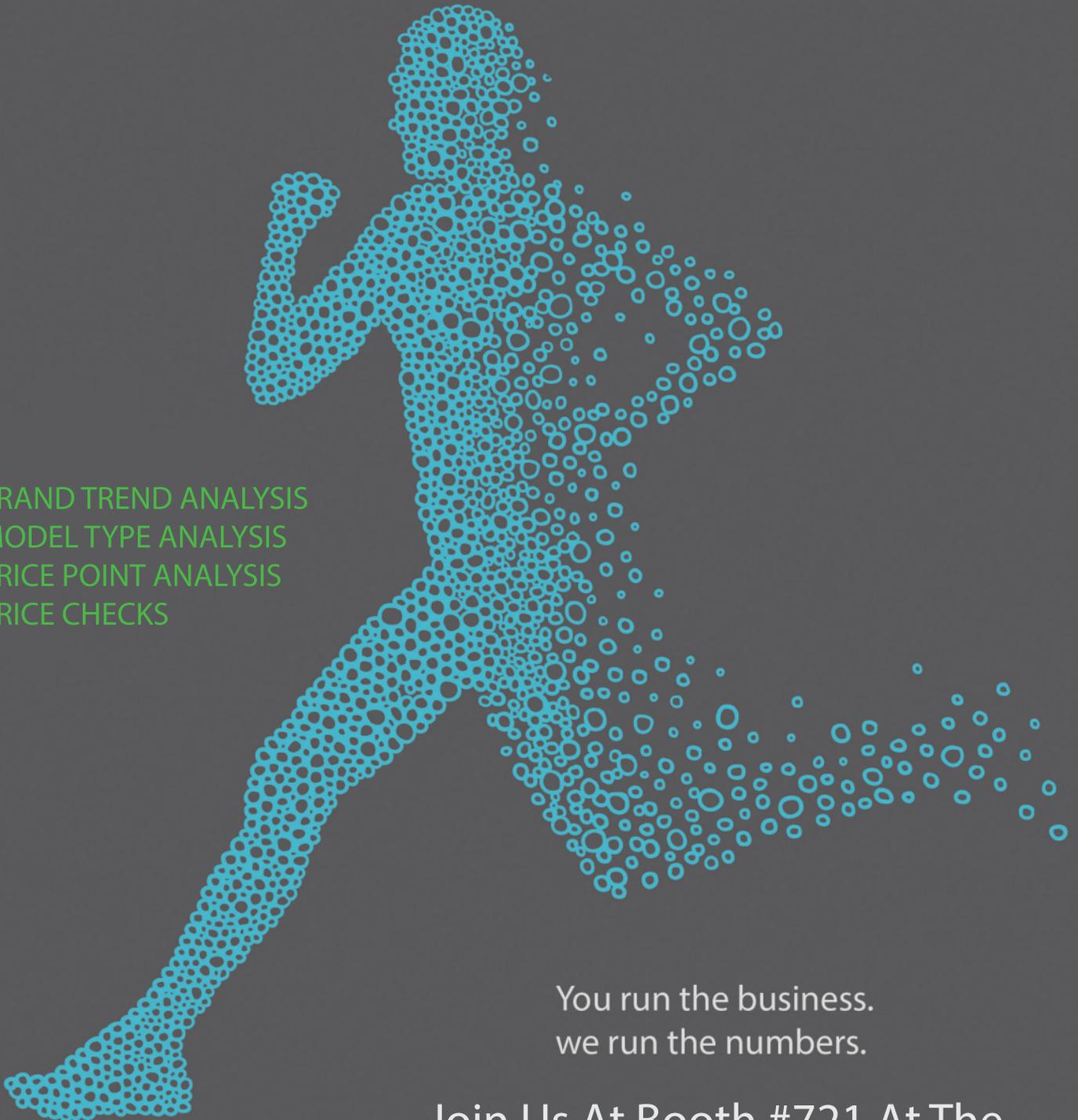
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New Products



Saucony / Zealot: This summer Saucony is going for devotion with its new Zealot neutral runner. The shoe uses three of the brand's run technologies: EVERUN cushioning in the topsole, as well as the Isofit dynamic fit system and a Tri-flex outsole using lightweight iBR+ blown rubber for increased ground contact. **MSRP \$130.**

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Icebug / Zeal2 RB9X: The upper material in this trail running shoe has been updated with a Kevlar material that isn't bulletproof, but is both softer and more durable. In the midsole construction, the Zeal provides a stable but soft heel grip, a combo made possible through the molded midsole cradle on the interior side of the shoe. **MSRP \$149.95.**

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Ryka / Revive: This women's trail walker style lets wearers take on the trails in comfort. The brand's proprietary Re-zorb cushioning material adds comfort in the heel crash pad, and a grooved rubber outsole is designed for stability over rough trail. Delivers 8/15. **MSRP \$70.**



On / Cloudventure: Swiss brand On Running is tackling the trails for fall with its new Cloudventure family of trail running styles. All styles include a sticky rubber outsole with a unique triangular grip pattern, and the brand's trademark pods engineered for responsive cushioning on downhills. The collection will launch 6/17 and is targeted to running specialty, outdoor and premium footwear accounts. The collection has four styles. **MSRP \$149.99 to \$179.99.**



Altra / Lone Peak 3.0 NeoShell Mid: An extended upper on this trail running/hiking shoe provides added stability and protection. It features TrailClaw tech for traction on all terrains and is made with Polartec's NeoShell fabric, making it 100 percent waterproof. **MSRP \$160.**

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Spenco / Nomad Moc Lite: The women's Nomad Moc Lite is a performance enhanced version of the brand's popular Nomad Moc. Lightweight soft shell materials offer breathability and reduce the weight of the moc. It features arch support and cushioning technology. Also has a molded rubber toe for added protection. **MSRP \$99.99.**

Vionic / Fyn: The Fyn sneaker is designed to keep the foot in neutral whether walking or in the gym, preventing and relieving leg, knee and lower back pain and plantar fasciitis. It features a flexible outsole, a podiatrist-designed orthotic and a breathable mesh upper. **MSRP \$109.95.**

Superfeet / Outside Sandal: The Outside sandal, here in a women's style, aims to deliver on four decades of podiatric research—in sandal form. The Outside sandal has the right amount of contour in its foot bed with supportive shape under the arch and deep pockets to cradle the heel. The sandals offer style and support for post-race relaxation or trips to the beach... and beyond. **MSRP \$59.95.**



Balega / Enduro No Show: These women's socks are designed to provide a great fit with soft cushioning from heel to toe for comfort during physical activity or during everyday life. The deep heel pocket prevents slippage, while an arch support band wraps around the midfoot for a snug fit. A heel tab protects the Achilles from blisters and the Dynamix fabric system keeps the foot cool and comfortable. **MSRP \$12.**

Darn Tough / Women's Vertex: The Vertex collection aims to offer breathability and performance wicking without sacrificing protection. Seamless comfort plus a "perfect fit" combine to eliminate hot spots and chafing. The sock is offered in Coolmax or Merino wool construction with ultra-light or ultra-light cushion thicknesses and several styles (no-show, 1/4 sock, and micro crew). Made in Vermont. **MSRP \$15-\$18.**

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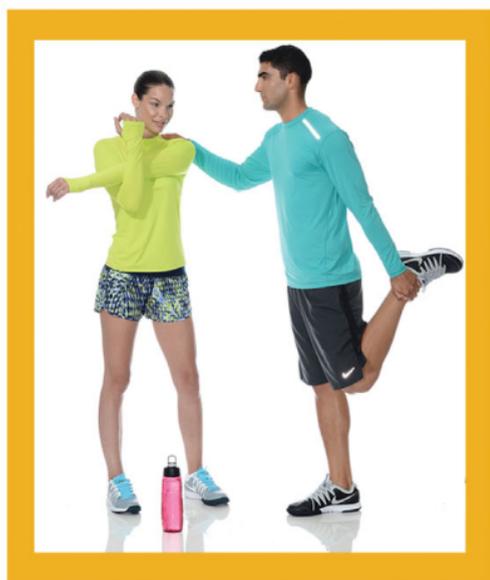


CW-X / Generator Revolution Tight: Patented CW-X EXO-Lite Seamless Support Web technology in the Generator Revolution running tight offers up a comprehensive muscle and joint support system for athletes. Made from new four-way stretch Coolmax fabric featuring laser-cut Support Web technology, the seamless-engineered tight has a Mt. Fuji print. **MSRP \$225.**

OS1st / AF7 Ankle Bracing Sleeve: Products in the OS1st Brace Layer System are designed to provide orthopedic bracing with medical-grade compression and specialized silicone gel applications as a method of support. The OS1st KS7 Performance Knee sleeve is designed to be worn during activity and is thin enough to wear with any gear or apparel, while the AF7 Ankle Bracing Sleeve (pictured here) can be worn in any shoe. **MSRP \$24.95.**



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Brooks / Frontrunner Racer

Designed for a secure fit, this bra from Brooks is a sleek, seamless style that is also designed to be seen. Lightweight with a flattering shape, it has contoured cups for enhanced support. Seamless knit provides soft, chafe-free comfort. **MSRP \$56.**

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Eagle Creek / Pack-It Sport Fitness Locker: Holds everything an on-the-go athlete might need for a workout in a top-loading format that's perfectly sized for a locker. Agion treated fabric keeps odor in or out, and keeps everything organized and easily accessible. **MSRP \$18.**

TriggerPoint / CORE Roller: The new TriggerPoint CORE Roller features a solid-core design with the signature GRID pattern technology that replicates the feeling of a massage therapist's hand. The patented, multi-density pattern of the solid foam roller is designed to channel blood and oxygen while you roll for varying levels of effective self-massage. **MSRP \$29.99.**

Body Glide / For Her: Formulated for women, this anti-chafing, moisturizing balm helps retain skin moisture with a dry, invisible barrier against chafing, irritation and raw skin caused by rubbing. It is never wet or greasy, according to the brand. It is skin-safe and sweat-resistant and keeps pores clog free. **MSRP \$7.99.**

CTR / Summit Ladies Vent Cap: Featuring UPF 40+ protection, this folding, packable cap boasts a feminine but technical fabric for summer months and sun protection. Wicking mesh panels offer maximum breathability and the wicking sweatband offers a comfort element. Available colors: Coral, White and Cream. **MSRP \$19.99.**



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Fun Facts Revealed in Brooks Survey



Brooks shares data about runners.

Nearly 60 percent of runners share updates about their runs on social media. And 35 percent of runners feel selfies are a must. This and other interesting data comes courtesy of the fourth annual Brooks Global Run Happy Report. Findings from the Brooks survey reveal that the power of running goes beyond just the run. Nearly all runners (97 percent), said running makes their day better. Fifty seven percent of runners reported they're most likely to come up with their most creative ideas on the run versus in the shower (18 percent) or in the car (13 percent). Worldwide, 59 percent of runners said they share their runs on social media and Facebook is the most popular platform (40 percent). Whether before, during or after, 35 percent of runners agreed run selfies are a must.

According to the Brooks report, for women worldwide, the greatest concern when running is lack of support from their sports bra (30 percent said so). When they find the right fit, more than half of female runners in the U.S. (65 percent) said they would wear their sports bra in place of their regular bra.

Fifty six percent of female runners said they always or sometimes wear makeup on the run while 44 percent vowed never to sweat it out with makeup. ■

Merrell Bolstered by Product Intros

Merrell is focused on ramping up product innovation and increasing brand awareness.



early reception to its women's lifestyle sandals collection, a meaningful part of Merrell's Spring-Summer business.

And Wolverine senior management says new strategic partnerships with key retailers that focus on wider presentations of certain product ranges and Merrell's lead sponsorship of the global Tough Mudder competition are among the key drivers that are only just beginning to ramp up.

Merrell is moving ahead with a strategy to focus on product innovation and increase brand awareness. Recently, Wolverine overhauled and restructured the brand's apparel and accessory operation, closing a Portland, OR, office to relocate the global Merrell team in Rockford, MI, and decided to exit wholesale apparel/accessories in favor of collections strictly for the brand's 300

worldwide stores, including nearly 60 in the U.S.

In the bigger picture for Wolverine's portfolio of a dozen brands, the company is establishing an innovation, consumer and design center at its global headquarters that includes a doubling of its consumer research and market intelligence group and additional resources for advanced concepts. ■

Merrell has reason for optimism. The brand, whose parent Wolverine Worldwide remains in pursuit of its next president, saw strong early sell-throughs from new introductions in the first quarter of 2016, notably the Capra Bolt, Moab Edge and All Out Crush. In the active lifestyle segment, Merrell is pleased with the



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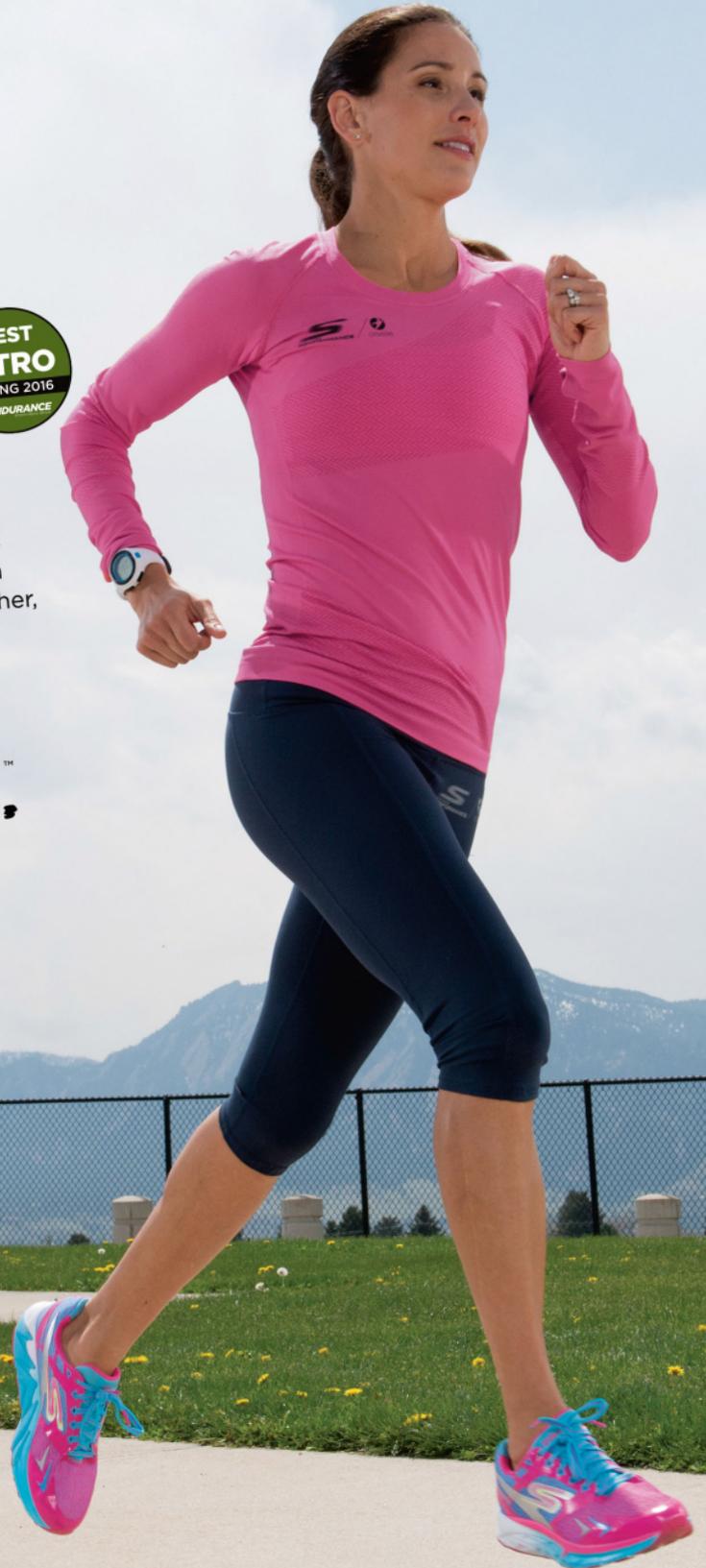


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